PHILANTHROPIC PARTNERSHIP WITH PROFESSIONAL ADVISORS

FOUNDATION FOR THE CAROLINAS

Foundation For The Carolinas offers philanthropic expertise to help your clients achieve their charitable goals.

Foundation For The Carolinas is honored to work with professional advisors across the Carolinas, providing expert solutions for donors who want to include charitable giving in their financial and estate planning. Our knowledgeable team of experts can help identify your clients' motivations, provide exceptional philanthropic resources and ensure that each charitable investment has the greatest possible impact for both your client and their beneficiaries.

As the region's philanthropic home, FFTC offers your clients a convenient single point of contact for their charitable contributions, as well as the flexibility to accept a wide range of assets, such as closely held business interests, real property, qualified retirement plans or IRA assets, life insurance proceeds and trust assets. And because we are a public charity, your clients will receive maximum tax benefits for income, gift and estate tax purposes.

We welcome the opportunity to meet with you and your clients to discuss the ways we can help them achieve their goals.

Contact us today for more information:

Visit
220 North Tryon Street
Charlotte, NC 28202

Call
704.998.6412

Email
advisors@fftc.org

Learn more
www.fftc.org

A highly responsive team with deep expertise in structuring gifts and providing counsel and guidance

We work to create a seamless partnership, adding philanthropic expertise to the services you provide, always with great respect for the relationship that exists between you and your clients.

We offer expert assistance in creating and implementing charitable plans that are fully integrated with your client's business, personal and financial planning goals.

We offer unique solutions designed to leverage gifts of closely held business interests and real property, offering both immediate and future tax benefits.

We provide personalized services structured to meet the specific needs of your clients and their families, including services to private foundations.

Our Investment Alliance Program allows you and your firm to retain the investment management of funds created by your clients while working in partnership with FFTC to address your client's charitable objectives.

FFTC provides continuing education opportunities to inform professional advisors about charitable planning.

FFTC Cabinet of Professional Advisors

Bobby Anderson
TIAA

Jan Beatty-Hendley
Pinnacle Asset Management

Sam Bowles
New Republic

Russ Cearley
Signature FD

Christian Cherry
Crisp Cherry McCraw PLLC

Gray Dyer
Dyer & Co., LLC

Jessica Hardin
Robinson Bradshaw

Seth Honea
CAVOK Family Office

Kelly Jesson
Jesson & Rains PLLC

Femi Lamikanra
Fifth Third

Chris Matthews
EY

Suzy Niemann
Milburn Services, LLC

Holly Norvell
Johnston, Allison & Hord, PA

Deni Pifer
Pifer Estate Law

John Potter
Potter Law Firm

Todd Stewart
Stewart Law, PA

David Vines
Offit Kurman

Trenton Whalen
Fifth Third

Kathryn Wysong
Andover Group / UBS

Andy Young
Morgan Stanley

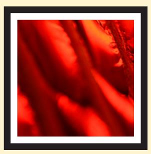
SMART, FORWARD-THINKING PHILANTHROPIC SOLUTIONS

FOUNDATION FOR THE CAROLINAS

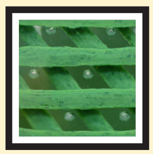
Funds can be established with a variety of assets, and we make it easy to get started. Call 704.998.6412 or email philanthropy@fftc.org.

Inspiring The Art of Philanthropy

FFTC
DONOR ADVISED FUNDS



FFTC
AGENCY FUNDS

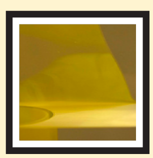


FFTC
SCHOLARSHIP FUNDS

FFTC
PLANNED GIVING

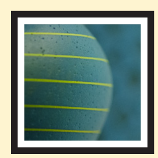
FFTC
COMMUNITY IMPACT FUNDS

FFTC
FIELD OF INTEREST FUNDS



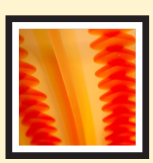
FFTC
SUPPORTING ORGANIZATIONS

FFTC
CUSTOM PHILANTHROPY SERVICES

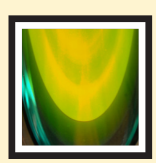


FFTC
CHARITABLE TRUSTS

FFTC
GIFTS OF REAL PROPERTY



FFTC
GIFTS OF BUSINESS INTERESTS



FFTC
DESIGNATED FUNDS